Market evolution: Preparations of meat and fish (CN 16) — 2015–2025

Introduction

Between 2015 and 2025, the European Union's external trade in preparations of meat, fish, crustaceans, molluscs and other aquatic invertebrates (CN 16) underwent a profound transformation. The aggregate value of both exports and imports rose substantially, yet the underlying drivers for the two flows were radically different. While export growth was almost entirely price-led, imports expanded on the back of both higher volumes and moderately rising unit values. As a result, the EU's longstanding deficit in this product group narrowed to near-balance. The period also witnessed a reshuffling of trade partners, a marked shift in the geography of EU production and export specialisation, and significant price shocks that tested supply-chain resilience. This report describes and interprets these dynamics using the full data window 2015-2025.

Export value outperforms volume across all key product categories

The overall export value of CN 16 grew from EUR 3.80 billion in 2015 to EUR 5.67 billion in 2025, a jump of 49.3 %, while the shipped tonnage actually edged down by 2.0 % (from 990 thousand to 971 thousand tonnes) General Overview. The entire expansion is therefore attributable to a 52.3 % surge in the average unit price, from EUR 3 834 to EUR 5 841 per tonne.

Prepared meat and sausages drive the export basket and show the sharpest price escalation. In 2025, the two largest export sub-categories were prepared or preserved meat (CN 1602) and sausages (CN 1601), together accounting for EUR 4.14 billion out of a total of EUR 5.67 billion Product Segment Breakdown. Unit prices for prepared meat rose from EUR 3 594/tonne in 2015 to EUR 5 314/tonne in 2025 (+47.8 %), while sausage prices climbed from EUR 3 591/tonne to EUR 5 841/tonne (+62.6 %). Prepared fish (CN 1604) exports also saw a steep price increase, from EUR 3 876/tonne to EUR 6 646/tonne (+71.5 %), though their volume contracted slightly, implying that high-value fish preparations are gaining importance in value terms even as physical outflows stagnate.

Preparation segment growth (EUR bn, 2015 vs 2025)

Segment	2015 Exports	2025 Exports	Change (%)	2015 Export Price (EUR/t)	2025 Export Price (EUR/t)
Prepared meat (1602)	1.82	2.65	+45.6	3 594	5 314
Sausages (1601)	0.83	1.49	+79.5	3 591	5 841
Prepared fish (1604)	0.82	1.17	+42.5	3 876	6 646
Crustaceans/ molluscs (1605)	0.26	0.32	+23.0	8 559	9 524
Extracts & juices (1603)	0.02	0.04	+80.2	4 886	5 699

A structural trade-balance correction and a pivot in sourcing partners

The chronic deficit in CN 16 turned into near-balance by 2025. EU imports grew from EUR 4.61 billion in 2015 to EUR 5.73 billion in 2025 (+24.3 %), a much more modest rise than exports. With import volumes increasing by 7.8 % and import unit prices by 15.3 %, the trade deficit shrank from EUR –813 million in 2015 to just EUR –61 million in 2025. In 2022 the EU even recorded a trade surplus of EUR 323 million, the only surplus in the series, driven by a temporary import price spike that curbed volumes General Overview. Net import reliance – the share of apparent consumption sourced from outside the EU – fell from double digits in the early-2000s to around 2–5 % during 2019-2024, underscoring the bloc's enhanced self-sufficiency Net Import Reliance.

Brexit and global competition reshuffled both import sources and export markets. The United Kingdom's role as an import supplier to the EU collapsed after 2020, with EU purchases falling from EUR 573 million in 2015 to EUR 325 million in 2025 (–43.4 %). Imports from Brazil also halved (–47.2 %), partly due to sanitary and structural factors. These declines were more than offset by dramatic increases from Ecuador (+140 %, to EUR 981 million), China (+160 %, to EUR 530 million) and Vietnam (+50.6 %, to EUR 363 million). On the export side, the United Kingdom remained by far the largest destination (EUR 3.22 billion in 2025, +38.2 %), but the most dynamic growth occurred in the United States (+193.8 %, to EUR 454 million), Ukraine (+523 %, to EUR 98 million) and Serbia (+123.6 %, to EUR 91 million) Top Partners. The concentration of exports, as measured by the Herfindahl-Hirschman index, fell from 3 859 to 3 396 (–12 %), signalling a gradual diversification away from the UK-centric pattern; import concentration rose slightly (HHI from 624 to 687), largely because Ecuador's share grew rapidly Concentration HHI.

Top extra-EU partners: value shift 2015 → 2025

Imports from	2015 (EUR m)	2025 (EUR m)	Change (%)	Exports to	2015 (EUR m)	2025 (EUR m)	Change (%)
Ecuador	408	981	+140.2	United Kingdom	2 328	3 217	+38.2
Thailand	453	466	+2.8	United States	155	454	+193.8
United Kingdom	573	325	–43.4	Switzerland	215	327	+52.0
China	204	530	+160.0	Ukraine	16	98	+523.0
Brazil	452	239	–47.2	Norway	123	146	+19.4
Morocco	380	464	+22.1	Serbia	41	91	+123.6
Viet Nam	241	363	+50.6	Japan	81	129	+59.4

Member-State specialisation and vulnerability to global price shocks

Central and Eastern member states have become the EU's export engines. In 2015, Ireland and Denmark accounted for the largest export shares among member states (EUR 658 million and EUR 446 million, respectively). By 2025, Poland had surged to EUR 984 million (+181.3 %), becoming the top EU exporter, while Spain (EUR 625 million, +85.5 %) and Italy (EUR 619 million, +110.5 %) also recorded triple-digit growth Top EU Reporters. Specialisation indices confirm this shift: in 2025 Lithuania (RSCA 0.50), Latvia (0.45), Denmark (0.45), Poland (0.36) and Spain (0.34) are the most specialised exporters in CN 16, while large economies such as Germany, France and the Netherlands are slightly under-specialised (negative or near-zero RSCA), reflecting their broader export portfolios Specialisation.

The 2022 price shock revealed vulnerabilities in critical aquatic supply chains. The year 2022 stands out as an inflection point. Import unit prices jumped for nearly all major aquatic suppliers: the algorithm detected a 29.9 % price shock for the Philippines, 26.3 % for Ecuador and 24.6 % for China, all centred on the 2022 trade period Price Shocks. These spikes, linked to post-pandemic logistics chaos, elevated feed costs and supply constraints, temporarily pushed import prices to their historical maximum (overall import price peaked at EUR 5 194/tonne in 2022). Import quantities contracted in several origins that year, allowing the EU to record its sole surplus. On the export side, a sharp, long-lasting price depression for Japan (–28.1 % in 2018, linked to a bilateral trade agreement that reduced tariffs for high-quality meat products) and a 57.9 % supply-driven price hike for Angola in 2023 illustrate the diverse nature of shocks affecting EU trade flows.

Volatility indicators confirm that EU imports are most exposed to swings from traditional protein suppliers: the coefficient of variation of annual import quantities from Brazil reached 0.57 and that from the UK 0.42, while the mainseafood partners Ecuador (0.21) and China (0.33) also display non-negligible year-to-year fluctuations Volatility Overview.

Conclusion

Over the 2015-2025 window, EU trade in CN 16 has been reshaped by the interaction of commodity price inflation, the post-Brexit reconfiguration of trade relationships, and the relentless rise of Central and Eastern European processing industries. The bloc's export performance improved dramatically in value terms without a physical expansion, and the structural trade deficit was all but eliminated. At the same time, the increasing reliance on a handful of aquatic suppliers in Latin America and Asia, combined with the lasting price shock of 2022, points to a need for careful monitoring of supply-chain resilience. The data confirm that the sector has entered a new phase in which price dynamics and geopolitical shifts matter at least as much as traditional volume-based competitiveness.

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